Ask yourself: Will my money last as long as I do?

Will my money keep up with inflation?

How can I benefit when the economy starts to improve?

How do I know if my current adviser is the best for me?

Concerned about your financial health?
Maybe it's time for an objective

Second Opinion

We offer just that.

Worried? Frustrated? Feeling overwhelmed and confused?

You may have had one or several of these reactions to the economic downturn of the past few years. You might be asking what your next steps should be. Maybe you don't have a financial adviser, or if you do, you might wonder if your current plan – or adviser – is really the best fit for you.

Financial health is like your physical health.

If you take good care of it, you're more likely to have a healthy future. Even when you get regular advice from an experienced professional, whether a doctor or financial adviser, you can sometimes benefit from a second opinion. In today's uncertain economy, a fresh perspective from Bloomsbury could be exactly the second opinion you seek.

Excellent service as standard.

At Bloomsbury, our mission is to provide clients with financial confidence. Highly personalised, objective advice and efficient management are the cornerstones of our firm. We've been helping clients work towards achieving their financial goals for over 15 years.

Intimacy and security.

We combine the responsiveness and intimacy of a small wealth management company with the financial security and resources of the Raymond James organisation. Bloomsbury has been consistently recognised as one of the Top 100 firms in the UK financial advice community by New Model Adviser, an achievement which recognises prominent leaders and outstanding achievements.

BloomsburyWealth®

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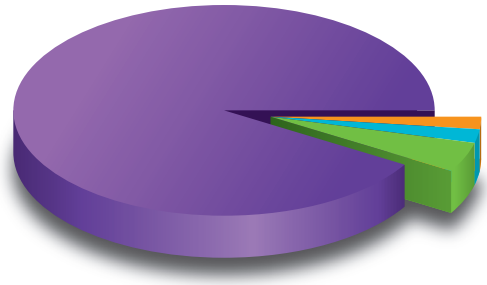
We provide advice and recommendations from the whole financial market. Our comprehensive approach enables us to view investments in the context of your overall financial picture.

Get your portfolio back on track with our 'second opinion' analysis.

What is the single most important aspect of portfolio performance? It's definitely not timing the market. It's not even picking the "right" investments. Portfolio allocation is by far the most important determinant of the variation in portfolio performance.*** We call this "portfolio balance." Having proper balance, based on your unique needs, can help minimise risk and take the guesswork out of financial decisions.



Determinants of Portfolio Performance*

- *Long-Term Asset Allocation Policy 91.5%*
- *Security Selection 4.6%*
- *Other Factors 2.1%*
- *Market Timing 1.8%*

Strategy, structure and support.

Together we'll work out what's important about money to you so that we can devise a suitable wealth strategy. We'll help you to structure your affairs so that you are organised and in control. We'll also be available to give you the support and reassurance that you are on track and minimising risks, taxes, costs and complexity. For details about our process, visit our website at *www.bloomsburywealth.co.uk*

Making the complex simple.

A "second opinion" analysis from Bloomsbury will give you a clear understanding of your financial picture. You'll have a better foundation from which you can feel empowered to take control and make more-informed decisions, whether or not you choose to utilise our services in the future.

Change made easy.

If we do decide to work together, the process of changing advisers is simple and hassle-free—just sign a few forms and we'll take care of the rest for you. Our clients work with us on a percentage-of-assets fee (as opposed to transaction) basis, to ensure objectivity.

CISI CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT — ACCREDITED FINANCIAL PLANNING FIRM™

- A multi award winning firm; NMA Top 100 Adviser firm in the UK, 2016
- All advisers Chartered and/or Certified Financial Planners[CM]
- All advisers have a minimum of ten years' experience
- Team-based approach
- Exceptional attention to detail
- Collaborative and engaging planning process
- Visual and easy-to-understand reports

"Bloomsbury are down to earth and great to work with... they listen to your personal situation and goals to make the financial plan help you live the life you want."

DW (SENIOR EXECUTIVE FTSE250 COMPANY)

Call us today to schedule a complimentary initial consultation

Discover how Bloomsbury's highly personalised approach to wealth management can make the difference you need. So call us right away. The sooner we start working together, the sooner you'll get the clarity and confidence you need to stop worrying and start enjoying your life.

Subject to meeting qualifying criteria

BloomsburyWealth®

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